



United States  
Department of  
Agriculture


Office of the  
Assistant Secretary  
for Administration

Office of  
Procurement and  
Property  
Management

300 7<sup>th</sup> Street  
Southwest  
Room 302  
Reporters Building

Washington, DC  
20024-9300

TO: USDA Purchase Cardholders

FROM: John T. McCain   
Departmental Program Manager  
USDA Charge Card Service Center NOV 3 2008

SUBJECT: Mandatory Cardholder Training

US Bank, USDA's new charge card provider, has begun mailing Purchase Cards to existing cardholders. Many of you have already received and activated these cards. (Please note that these US Bank-issued cards will not be operational until November 30, 2008). If you have not received your card by November 15, 2008, please contact your Local Agency Program Coordinator (LAPC). In preparation for using these cards, USDA requires that cardholders take specific on-line system and policy training, as outlined on the attached document.

Cardholders are required (by OMB Circular A-123, Appendix B) to complete purchase card training. There are two types of web-based training (WBT): system training and policy training. The policy training has been made available on US Bank's web site for your convenience. Because many USDA cardholders may also be approving officials (AOs) and/or LAPCs, there will clearly be some overlap in the required training. It is not necessary to retake the system training if you have already taken this training. However, there are some additional specific modules in USDA's WBT policy training that must be completed for certification. In addition to the required lessons, the WBT site provides numerous user guides and simulations relating to various aspects of Access® Online. Additional information on accessing the WBT is attached. After completion of training modules, please forward a copy of your training certificate with the name of your AO to your LAPC.

All training shall be completed by January 30, 2009, even though the new cards will be available for use by November 30, 2008. Cardholders who fail to complete the training by this date will have their accounts placed in an "inactive" status—i.e., any attempt to use the card will be declined at the point of sale.

For information (including Frequently Asked Questions) regarding the transition to the new US Bank, please refer to the Charge Card Service Center (CCSC) website ([www.usda.gov/procurement/ccsc](http://www.usda.gov/procurement/ccsc)). If your specific question is not addressed, you may e-mail the CCSC at [ccsc@da.usda.gov](mailto:ccsc@da.usda.gov).

Attachment:

## Web-based Training for Access® Online and USDA Policy

Existing cardholders and approving officials (AOs) must be trained to use the purchase card and/or alternative payment methods. USDA, in partnership with US Bank, has developed web-based training (WBT) that must be taken for certification. The training is available at <https://wbt.access.usbank.com>. Once at this site, the first screen allows two log in options: Option 1--Lesson and Certification Login; Option 2--Lesson Only Login. For certification, Option 1 should be used and requires that the user register. A user who has more than one role in the USDA Charge Card Program—e.g., cardholder, AO, and Local Agency Program Coordinator (LAPC)—will need to register separately for each role. However, the same ID and personal password should be used for each registration. Registration also requires the user to enter an “Organization Short Name.” “USDA” is the short name to be used here and throughout Access® Online. Registration also requires the user to enter an “Organization Short Name” and to choose a user type.” “USDA” is the short name to be used here and throughout Access® Online. For “Choose User Type”, select “**Government cardholder**”. A step-by-step screen print of each page for registration is also included for your use.

In addition to a personal password, logging in requires a WBT password. US Bank provides separate passwords for each role—cardholder, AO, and coordinator. Passwords expire every 60 days. Until December 3, 2008, use the password “casper”. Future notification of passwords will be provided to you by your LAPC. **After December 3, use the password “baltimore”.** Michelle Bales, LAPC.

Once registration is complete, the user should return to the login screen and log in. (It is possible to access the training without this step, but the user may not see the USDA policy modules.) After the user enters their username, personal password, and WBT password, they must click “Go” to get in.

What the user sees on the screen is a suite of lessons that have been “suggested” by the bank. This is a generic set of lessons and is not focused on USDA. The USDA- required lessons are listed below; other lessons may be taken, but they are not required. All lessons do not have to be completed at one time, but to get credit for completing the required training the user must present a printed certificate showing that the examination for each of the required lessons has been passed.

### **Required Cardholder Training**

- A. **Non-warranted cardholder**
  - Ethics\*
  - Green Purchasing\*
  - Section 508 (“Micro-purchases and Section 508”)\*
  - AbilityOne (under development)
  - Access Online\*

(NOTE: Certification is required for each of these modules, **including USDA Policy**)



Online Registration  
Navigation Basics  
Account Profile  
Transaction Management  
Transaction Approval Process (*USDA's process, even though it says  
"DOT only." This will be fixed in the near future.*)  
My Personal Information  
*USDA Purchase Card Policy*

**B. Warranted cardholder**

**Access Online\***

(NOTE: Certification is required for each of these modules, **including USDA Policy**)

Online Registration  
Navigation Basics  
Account Profile  
Transaction Management  
Transaction Approval Process (*USDA's process, even though it says  
"DOT only." This will be fixed in the near future.*)  
My Personal Information  
*USDA Purchase Card Policy*

\*Certification required.

**Website for web-based training:** <https://wbt.access.usbank.com>

Links for other required training are available at  
[www.usda.gov/procurement/ccsc/purchase\\_card.htm](http://www.usda.gov/procurement/ccsc/purchase_card.htm)

**Technical Help:**

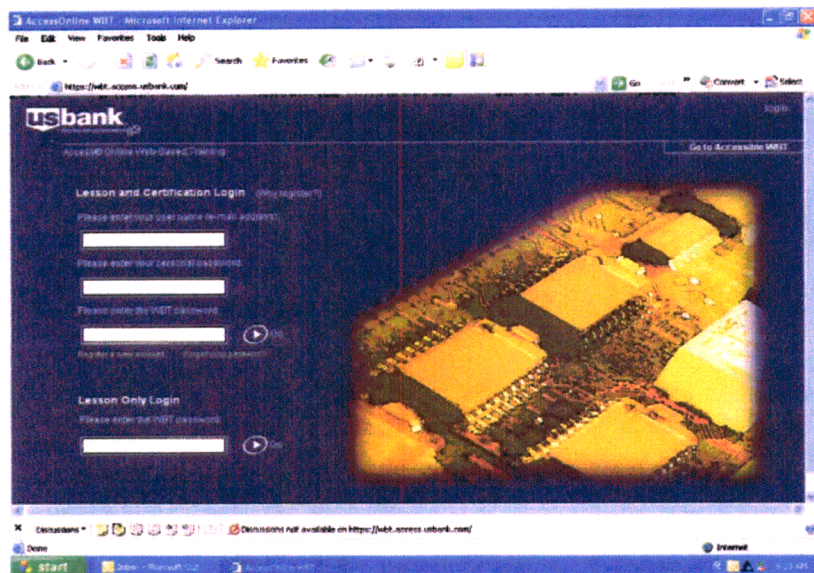
Access Online – 1-800-254-9885, option 2  
Cardholders/AOs – 1-888-994-6722

**Maintenance Credit Hours for Warranted Personnel**

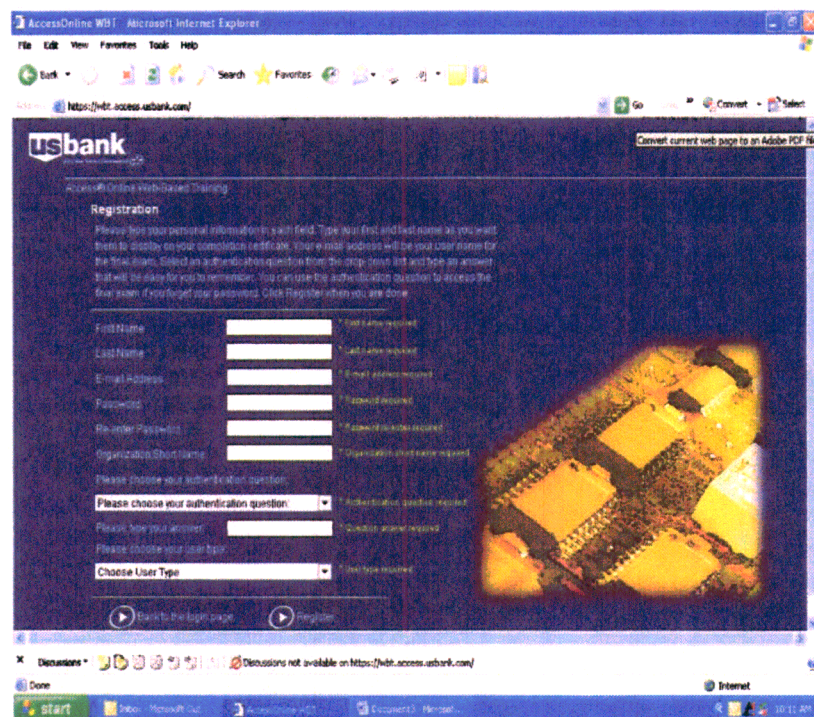
Instructor-led training – 16 hours (12 for instructor-led + 4 for Access  
OnLine)  
Microsoft Office Live Meeting (MOLM) - 9 hours (5 for MOLM + 4 for  
Access Online)  
Access Online – 4 hours

## Instructions for Registering in Access® Online

1. After accessing <https://wbt.access.usbank.com>: First Screen – Select “Register a new account”. This will bring you to the “Registration” screen.

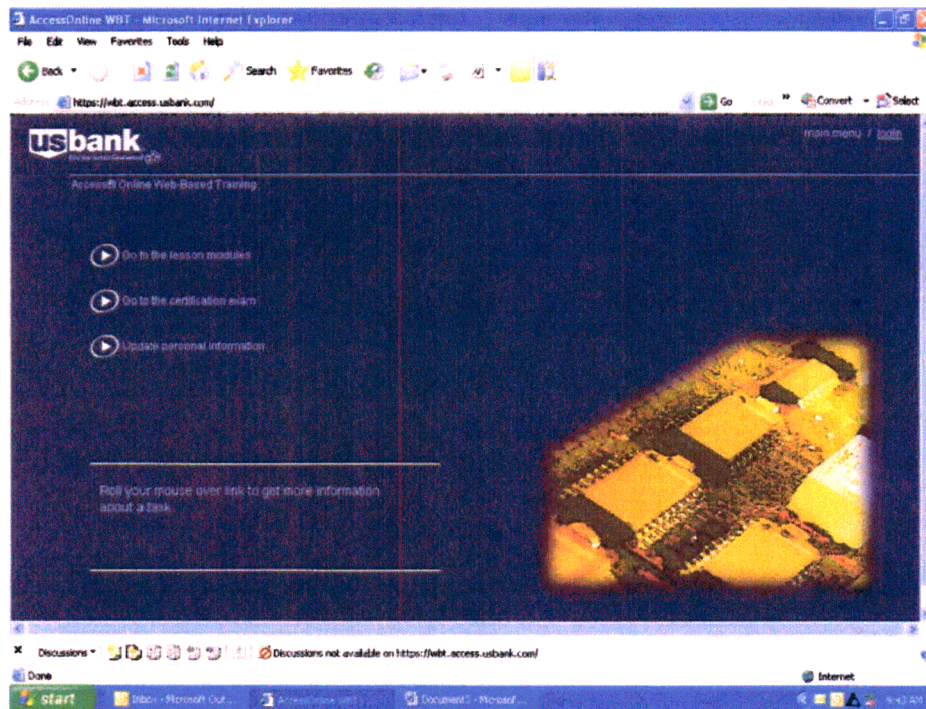


2. Registration – Enter personal information. At “Choose User Type”, select “**Government cardholder**”. Then click “register”. You will be brought to the Access Online Web-based Training Main Menu.

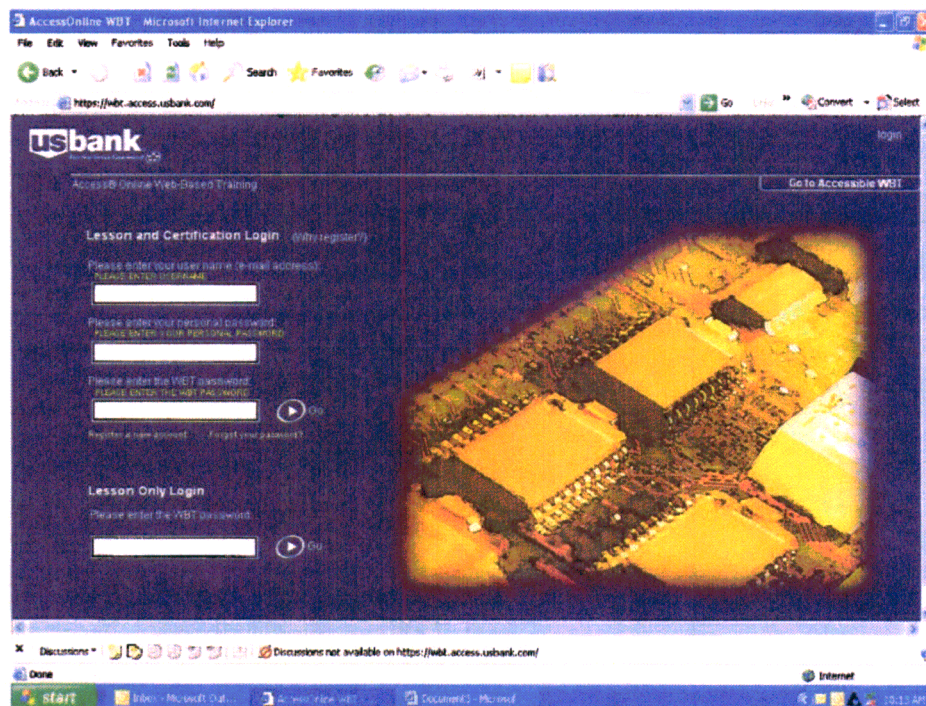




3. Access Online Web-based Training main menu – Select “login” at the top of the screen. You will be brought to the “Lesson and Certification Login”.



4. At the “Lesson and Certification Login” screen, enter information as prompted. For the WBT password, enter “casper”. Select go. You will be taken to the “Go to the lesson modules”.





5. At this screen, select the required cardholder lessons from the previous page. Then select, go to lessons.

